TEMPLATE · FREE TO USE AND ADAPT

Baseline care plan summary

The written summary for the resident and their representative.

Facility

42 CFR § 483.21(a)(3) · F655

Resident | Room | Admitted (date, time)

Baseline plan completed | Summary given | Given to (Resident / Representative) | Given by (name, role)

Initial goals

§ 483.21(a)(3)(i)

In their own words

Care team's goals

1

2

3

Discharge goal — Home · Home with help · Assisted living · Staying long-term · Not yet decided

Medications

§ 483.21(a)(3)(ii)

Current medications. Ask the nurse for the full list with doses. N new · C changed · S same as home

MEDICATION	WHAT IT'S FOR	VS. HOME	MEDICATION	WHAT IT'S FOR	VS. HOME
		N C S			N C S
		N C S			N C S
		N C S			N C S
		N C S			N C S
		N C S			N C S
		N C S			N C S
		N C S			N C S

Home medications on hold or stopped, and why

Diet

§ 483.21(a)(3)(ii)

Diet order | Supplements

Liquids | Food allergies

Baseline care plan summary

Resident _____

Services and treatments

§ 483.21(a)(3)(iii)

SERVICE	HOW OFTEN OR WHEN	FOCUS RIGHT NOW
Physical therapy		
Occupational therapy		
Speech-language pathology		
Nursing care		
Medical provider visits		
Social services		
Equipment		
Other		

Updates from the comprehensive care plan

§ 483.21(a)(3)(iv)

Care plan meeting _____ Where _____

Who's attending _____ Updated copy given _____

Changes to goals, medications, or services

_____

_____

_____

Who to ask

Recommended

ROLE	NAME	HOW TO REACH
Nurse or unit manager		
Social worker or case manager		
Therapy		
Medical provider		

Received by (signature)	Relationship	Date	Copy filed (initials)

Sections marked § are required by 42 CFR § 483.21(a)(3). The summary is due by the time the comprehensive care plan is complete (CMS guidance, F655). It can be given as soon as the baseline plan exists, within 48 hours of admission. Keep a signed copy.

Kevin E. Groh, PA-C · kevineugenegroh.com · Free to use and adapt · Not legal or compliance advice